

Applicant Name: \_\_\_\_\_

**Application for Financial Planning Reimbursement**

Eligible employees are regular employees who work half-time or more for six continuous years OR are tenured OR have reached the age of 50 with one year of service.

Reimbursements up to \$300 per employee are available. Reimbursements up to \$150 will be available after an eligible employee has attained six continuous years of service or is tenured. An additional \$150 will be available when the employee has reached age 50 for a total reimbursement of \$300. For those employee 50 years or older with one year of service, the total of \$300 is immediately available.

Eligible employees may apply for reimbursement by completing an application and presenting a paid receipt from the recognized financial advisor for costs associated with long-term financial planning advice to the Department of Human Resources. Human Resources will authorize payment and forward to payroll for processing. Costs associated with product transactions should be identified separately and are not eligible for reimbursement under this program. Reimbursement amounts are considered taxable income, will be paid through payroll, and will be shown as "supplemental pay" on the employee's earnings statement.

Please complete the following:

I am applying for financial planning reimbursement in the amount of \$\_\_\_\_\_. (Please attach an invoice highlighting charges for long-term financial planning advice. Product transaction costs are NOT reimbursable.)

I have read the program guidelines and understand both the program benefits and the eligibility requirements.

(Please sign) \_\_\_\_\_ Date \_\_\_\_\_

\*\*\*\*\*

***(for office use only)***

Applicant meets eligibility for financial planning benefit amount of \$ \_\_\_\_\_

Human Resources authorization \_\_\_\_\_ Date \_\_\_\_\_

Supplemental pay for period end date \_\_\_\_\_

Payroll Specialist acknowledgement \_\_\_\_\_  
(signature)

Notes: